DOCUMENT RESUME

ED 359 965 IR 054 596

TITLE Documenting Community Organizations.
INSTITUTION Central New York Library Resources Council, Syracuse.
PUB DATE 93
NOTE 13p.
PUB TYPE Guides - Non-Classroom Use (055)

EDRS PRICE MF01/PC01 Plus Postage.
DESCRIPTORS *Archives; *Community Organizations; Data Collection; Decision Making; *Documentation; *History; *Information Storage; Librarians; Library Role; Preservation; Recordkeeping; *Records Management

ABSTRACT

This booklet offers an introduction to keeping and documenting the history of community organizations. With their variety of purposes these organizations add texture and variety to a community's heritage. A knowledge of that heritage, provided by written documentation as well as oral tradition, proves valuable to members of the organization, to historians and to the community itself. It should be the responsibility of someone in every organization to systematically save and preserve documents in an orderly fashion for future reference. Adequate historical records, well organized and readily accessible, can provide information for the organization's decision making. What to keep will vary, but permanent and temporary items can be determined based on the needs of the organization and its facilities for storage. A brief list of five resources suggests reliable and practical advice for the person who takes care of the organization's documents. A list of helpful organizations is also included. (SLD)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

Documenting Community Organizations

ED359965

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

☐ This document has been reproduced as received from the person or organization originating.
☐ Minor changes have been made to improve reproduction quality.

• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

Keith E. Washburn

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)"

11205496

The Central New York Library Resources Council
Documentary Heritage Committee

Documenting Community Organizations

Prepared by
The Central New York Library Resources Council
Documentary Heritage Committee

Contents

Introduction 1

Why Keep History? 2

What Records to Keep 4

Making Choices 6

Resources 7

Acknowledgements 9

Layout and design by Anne Hart Smith

Introduction

In 1831-32 a young Frenchman named Alexis de Tocqueville visited the United States. Like many Europeans of his day, he was fascinated to learn about this new country across the Atlantic. He published his observations in a famous book, *Democracy in America*.

One of the things which de Tocqueville found especially interesting in the United States was a fondness for forming associations for all sorts of purposes. He wrote, "The power of the association has reached its highest degree in America. Associations are made for the purposes of trade, and for political, literary and religious interests. It is never by recourse to a higher authority that one seeks success, but by appeal to individual powers working in concert."

The same is no less true today. Think of the many organizations to which you currently belong — religious or charitable, hobby or recreational, educational or scientific, community or neighborhood, business or professional. And, if your mail is typical, nearly every day you receive invitations to join more: to further political candidates or causes, to preserve landmarks or endangered species, or to join with others to share interests in a thousand-and-one other subjects.

Many organizations to which Americans belong are national or even world-wide in scope. Others serve only particular states, counties or local communities. With their variety of purposes these organizations add texture and variety to a community's heritage. A knowledge of that heritage, provided by written documentation as well as oral tradition, proves valuable to members of the organization, to historians and to the community itself. This booklet offers an introduction to keeping and documenting the history of community organizations.

Why Keep History?

Whether an organization is a church, a scout troop, a support group, a volunteer fire department, a softball league, or a hobby club, ***it makes history*** with everything it does. Whether an organization has been organized for 100 years or for just a few months, ***it has a history***. Whether an organization's purpose is charitable, educational, religious, or recreational, ***it generates historical documents***.

A historical document is any item which can convey information about past human activity. We tend to think of "documents" in terms of the Declaration of Independence, the Constitution, or even diplomas, licenses, deeds and certificates. "Documents" can, however, encompass a much wider assortment of papers or other items. Whatever the size or scope of an organization, there are documents which record its history such as:

- a charter or articles of incorporation indicating when and by whom it was founded,
- a constitution and bylaws telling its purpose and organizational structure,
- minutes of meetings recording details of activities accomplished and issues dealt with,
- financial records including not only details of income and expenses, but a sense of how the organization directs its efforts,
- bulletins, newsletters, programs, and other publications announcing the organization's activities and concerns,
- newspaper clippings, photographs, sound or video recordings documenting the organization's history,
- and for some, payroll records, building plans or other information.

It should be the responsibility of someone in every organization to systematically save and preserve these documents in an orderly fashion for future reference. This job can be given to a historian, secretary, president, director, or manager, but it should be a clearly designated responsibility.

Written documents will be needed to supplement and clarify an organization's oral tradition. In organizations where the founding members are no longer active, the written documents can be the sole source of information about the past purposes, intentions and activities of the organization. Common inquiries about the organization can be answered in the historical documents.

- When was the organization (or chapter) established?
- Who were the charter members?
- Who have been the presidents (or the award winners, or the committee chairs)?
- What programs or activities have the organization sponsored? (and When? and Who were the speakers?)
- When was the organization directory first published?

Adequate historical records, well organized and readily accessible, can provide information for the organization's decision making. The documentation can:

- provide an impartial "organizational memory" to resolve legal or other disputes,
- facilitate accountability to members, parent organizations or regulatory bodies,
- help avoid re-inventing the wheel and duplication of effort, thereby saving time, effort and money,
- assist in planning for organizational anniversaries or special events,
- help to instill pride in past accomplishments and inspire future improvements,
- identify long term members, volunteers, or contributors for recognition,
- and measure the organization's growth and development.

What Records to Keep

Whether the organization has an established historical documents (archives) collection or an unorganized pile of papers, knowing which records are likely to be of permanent value will help the person designated as historian to cope with current documents. Keeping the documents of an organization consists of:

- sorting and organizing,
- eliminating duplicates and non-essentials, and
- planning policies and procedures for storage and preservation of vital documents.

The historian will also add value by, whenever possible, making sure that items are dated and that photographs and audiovisual materials are identified with who, what, where, and when.

Community organizations that are affiliated with state, regional, national, or international organizations should seek guidance from their parent organizations in keeping important records. In general, a local organization should keep records of the local chapter's activities and membership and the national organization should keep records of national activities, publications, etc.

Many records that are updated frequently (such as membership lists, volunteer lists, or contributor lists) are kept on computer for easier manipulation and retrieval. The organization historian should request a printed copy for the permanent files on a regular basis.

There are two general categories of records created by organizations: **permanent** items of lasting value and **temporary** items. There are usually a greater number of items in the second category.

Permanent records of lasting value

General Files

- Operating documents such as the Charter, Constitution and Bylaws, including all amendments and revisions
- Minutes of meetings
- Membership lists
- Procedures manuals
- Organizational histories such as anniversary publications

- Financial records of origin, such as general ledgers and journals
- Awards, memorials and citations with accompanying documentation
- Photographs, audio or video cassettes, films, etc. of organizational activities
- Publicity such as clippings or articles about the organization or its membership
- Obituaries of officers, directors, etc.

Board Files

- Rosters of trustees, officers, committee chairs, etc.
- Minutes of board meetings
- Officers' files (arranged by year), including annual and special reports, important correspondence, budget and income/expense reports
- Committee files (arranged alphabetically by committee, and by year)

Special Files

- Projects such as workshops or conferences, jointly sponsored activities, community service projects, championships or honors
- Building or property records such as deeds, surveys, architectural drawings, etc.
- Legal documents such as contracts, insurance policies, etc.
- Publications such as bulletins, newsletters, membership directories, etc. (keep 2-5 copies of each)
- Reports or important correspondence of liaisons with other organizations
- Memorabilia such as awards, t-shirts, products used for fund raising, anniversary celebrations, etc.

Temporary Records

These may usually be discarded after a brief period unless they are the only records left.

- Acknowledgements
- Announcements of meetings
- Applications
- Ballots
- Bank statements
- Bills
- Budget work papers
- Cancelled checks
- Casual memoranda
- Invoices
- Manuscript versions of publications, articles or published speeches
- Maps unrelated to the organization or its property
- Payroll notices
- Receipts
- Reservations and confirmations
- Routine correspondence (requests, thank you notes, etc.)
- Sales literature
- Schedules
- Shorthand notes
- Tickets
- Time books and payroll records
- Vouchers

Making Choices

There are a number of choices an organization can make to insure that its historical documents are preserved for the future. It can:

- create and maintain its own archives,
- donate records to an existing archival or local history collection or to the headquarters or archives of a parent organization.

Before deciding where to keep the organization's documents, the group should consider the space, preservation, and staffing costs of keeping records and the need to have the records accessible for use and reference.

Historical documents should be kept in a secure and permanent place that is dry and reasonably climate controlled for protection from deterioration. Extremes of temperature (hot or cold) and humidity (dampness or dryness) should be avoided. Most attics are too hot, and many basements and garages are too damp to store paper, photos and tapes.

If an organization has a building, is there an adequate space where records can be filed and used? Is there a plan of action in case of fire, flood or natural disaster? Is there someone who can organize and file the records, prepare indexes or inventories of what is there, and retrieve and copy items when they are needed?

If an organization has no building, is there space in another building? If records are stored at a place of business, is there space in or near the office of the person responsible for those records? If a member must store records at home, is there space in a first or second floor closet or spare room? If records are stored at a member's place of business or home, are new records filed and are the records available for use?

If an organization plans to donate its documents to an archival collection or to a parent organization, will the documents be readily available? Can copies of some documents be kept locally, while originals are stored in an archives? Are the location and hours convenient for access to the documents? Are there records that require access more than once or twice a year? These should be kept locally until their use is less frequent.

An organization may want to seek additional information or the advice of an archivist in making these choices. Resources listed in this booklet may help. An organization's records are important historical documents that deserve protection. ***Keep them safe for the future.***

Resources

The following brief guide includes selected reliable sources that offer concise and practical advice for the person whose responsibilities include the care and arrangement of an organization's documents. Many of the resources include their own bibliographies. All of these titles are available through libraries, interlibrary loan, or directly through the Documentary Heritage Program of the Central New York Library Resources Council.

Basic Bibliography

Archives and You: The Benefits of Historical Records. State University of New York, New York State Archives and Records Administration, 1990.

A 12-page introduction to the importance of historical records in contemporary society.

Arranging and Describing Archives and Manuscripts by Frederic M. Miller. Society of American Archivists, 1990.

A detailed introduction to organizing historical documents, part of the SAA's Archival Fundamentals Series.

Let the Record Show: Practical Uses for Historical Documents. New York State Archives and Records Administration, 1989.

A 15-minute videotape introducing the importance of historical documents in contemporary life. It can be used with "Archives and You."

A Manual for Small Archives. Association of British Columbia Archivists, 1988.

A loose-leaf manual with a great deal of practical information for the person responsible for historical documents.

Understanding Archives and Manuscripts by James M. O'Toole. Society of American Archivists, 1990.

A detailed introduction to the importance of keeping history including a chapter on "The Archivist's Tasks: Responsibilities and Duties," part of the SAA's Archival Fundamentals Series.

Organizations

Documentary Heritage Program, Central New York Library Resources Council, 763 Butternut St., Syracuse, NY 13208. Phone: 315-478-6080; Fax: 315-478-0512

In addition to the resource collection for loan, the DHP keeps a file of archivists willing to consult with organizations in the region and lists of suppliers of archival library materials. A one-page "Tip Sheet: How to Store Photographs" is also available.

Historical Societies

- Herkimer County Historical Society, 400 N. Main St., Herkimer, NY 13350
- Madison County Historical Society, PO Box 415, Oneida, NY 13421
- Oneida County Historical Society, 1608 Genesee St., Utica, NY 13502
- Onondaga Historical Association, 311 Montgomery St., Syracuse, NY 13202
- Rome Historical Society, 200 Church St., Rome, NY 13440

In addition to these historical societies, many Central New York communities also have historical societies and public libraries with local history collections.

Lake Ontario Archives Conference

LOAC is an organization of historians and archivists that meets once a year for workshops and information sharing. Contact LOAC Secretary, Pat Virgil, at the Buffalo and Erie County Historical Society, 25 Nottingham Court, Buffalo, NY 14216, to be added to the mailing list.

New York State Archives and Records Administration, Cultural Education Center, 10A46, Albany, NY 12230. Phone: 518-473-8037

New York State Archives and Records Administration, Local Government Records Bureau, Region V, 207 Genesee St. Room 1400, Utica, NY 13501. Phone: 315-793-2780; Fax: 315-793-2782

The regional office offers workshops and technical assistance on records management for town, village, school district and other local government agencies.

Northeast Document Conservation Center, 100 Brickstone Square, Andover, MA 01810. Phone: 508-470-1010

NEDCC offers technical advice, contractual services and training in the conservation of historical materials. "Preserving Family Documents: Helpful Hints from the Northeast Document Conservation Center" is probably the best summary for the general public of preservation measures.

Society of American Archivists, 600 S. Federal St., Suite 504, Chicago, IL 60605. Phone: 312-922-0140; Fax: 312-347-1452

The SAA offers a free publications catalog and a small brochure "Who is the I in Archives?"

Acknowledgements

Central New York Library Resources Council

The Central New York Library Resources Council, familiarly known as CENTRO, has facilitated resource sharing among libraries since 1967. It is one of nine Reference and Research Library Resources (3R's) Councils in New York State. CENTRO serves libraries and library systems in Madison, Oneida, Herkimer, and Onondaga Counties. Members in the council include academic libraries, the Mid-York and Onondaga County Public Library systems, school library systems, hospital libraries, and special libraries in corporations and non-profit agencies. Programs for the Preservation of library and archival materials and for Documentary Heritage include not only libraries, but archives and historical societies in the region.

Keith E. Washburn, Executive Director
Central New York Library Resources Council
763 Butternut Street
Syracuse, NY 13208
Phone: 315-478-6080; Fax: 315-478-0512

Documentary Heritage Program

The CENTRO Documentary Heritage Program is part of the New York State Archives and Records Administration Documentary Heritage Program which has a goal of improving the documentation of New York State's historical development and works to raise awareness of the importance of historical records in New York State. The Committee has sponsored the "One Day in the Life of Syracuse and Onondaga County" (1990) and "Where in the World" (1991) projects for Archives Week. The Committee also organized workshops on "Basic Archives Management" and "Arrangement and Description of Archival Collections" to provide training for part-time and volunteer staffs of libraries, archives and historical societies. Members of the committee include:

Lynn Fisher (CHAIR)	Tully Area Historical Society/Tully Historian
Jon Austin	Rome Historical Society
Sharon Cooney	Lorenzo State Historic Site
Amy Doherty	Syracuse University Archives
Alice Knapp	Canastota Public Library
Edward Lyon	Onondaga Historical Association
Doug Preston	Oneida County Historical Society
Jeannette Smithee	Central New York Library Resources Council (ex officio)
Jane Spellman	Herkimer County Historical Society

KEY BANK

Printing Courtesy of
Key Bank of New York
A KeyCorp Bank